



Capture or upload client profile and signature photos

Uploading a Signature or Profile Photo in IFOA

You can take or upload a signature and profile photo in IFOA only for Individual Clients **who don't already have one saved.**

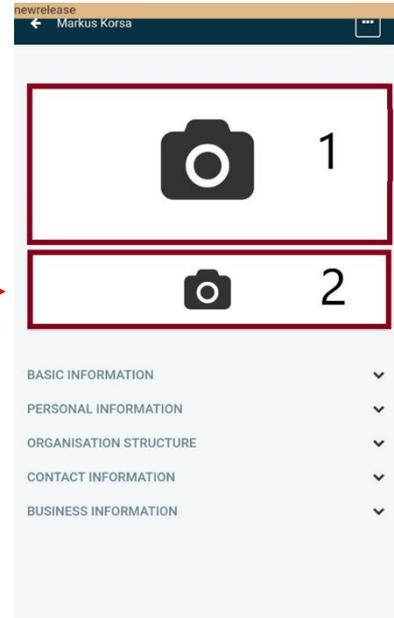
To do this, you must have these permissions:

1. Create Profile Image
2. Create Signature Image

Note: You don't need the Client Edit permission.

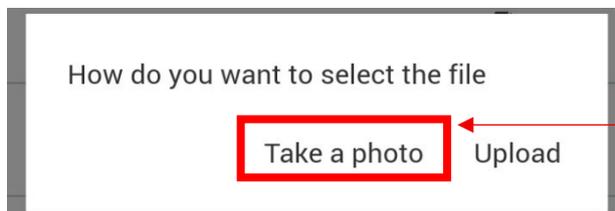
How to start:

1. Go to the client's **dashboard**.
2. If the client doesn't have a signature or profile photo yet, you'll see **two camera icons**, one for the **profile photo** and one for the **signature**.



NOTE:

- ▶ Users who do not have the 'Create Profile Image' and 'Create Signature Image' permissions, a "Photo Unavailable" message will appear in place of the camera icons.



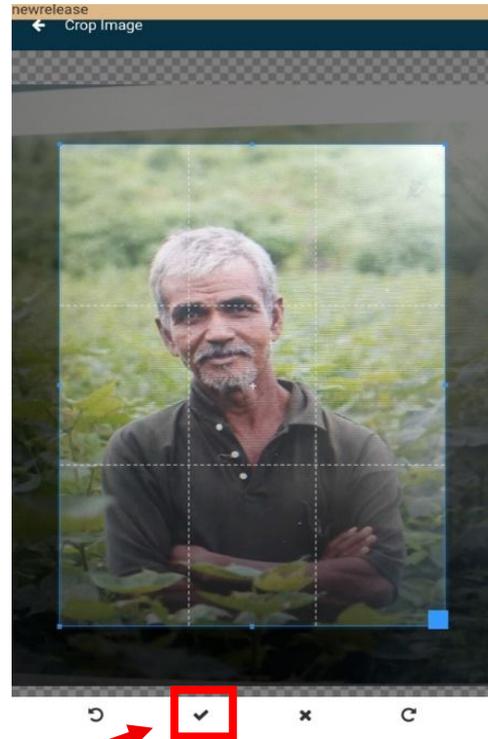
When you click either camera icon, a **popup window** appears displaying the **upload options**.

If you select “**Take a Photo**”, the camera on your device will open, allowing you to capture a photo directly.

Note:

Any photos you take will also be saved to your device’s Photos/Gallery.

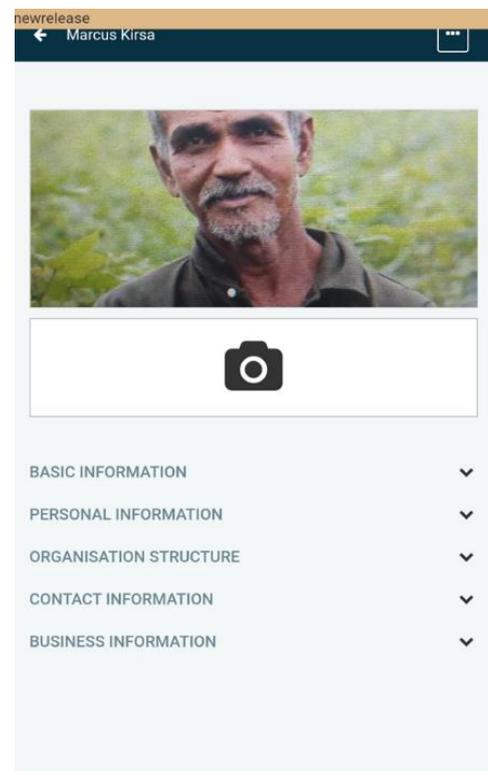
- ▶ You can retake the photo as many times as needed before submitting it.
- ▶ After you submit a photo, you’ll have several editing options available (or you can click the back arrow in the top-left corner to return to the client’s dashboard):
 - Crop the image
 - Rotate Left
 - Rotate Right
 - Cancel Changes / Revert to Original
 - Submit



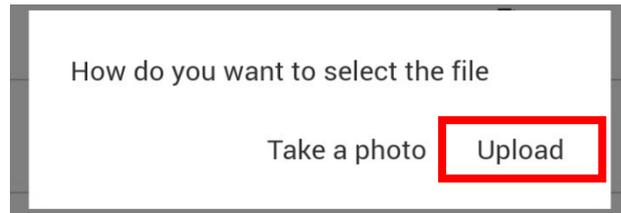
Note:

- ▶ After editing the photo, click the **checkmark icon** to submit it. Once submitted, IFOA will automatically save the resized image in **JPEG format**.

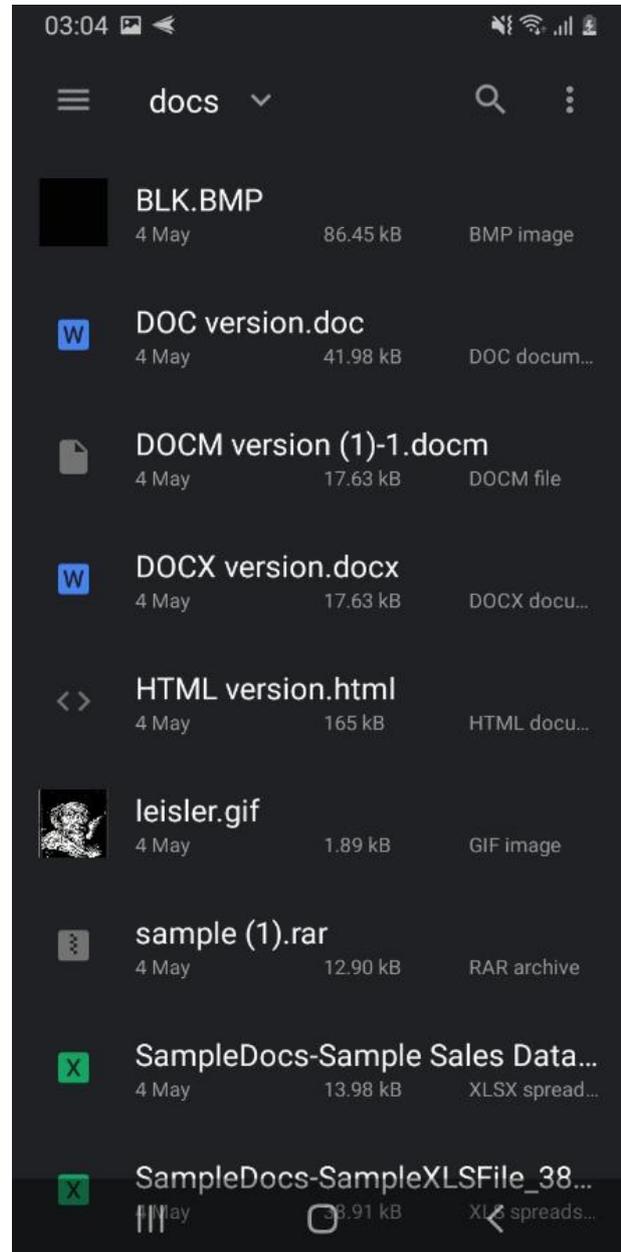
- ▶ After submitting, you’ll be redirected to the client’s dashboard, where the uploaded photo will now be displayed.
- ▶ To **add a signature image**, repeat the same steps used to upload the client profile photo.



- ▶ If you choose “**Upload a Photo**” instead of taking one, your device’s document or file folder will open.
- ▶ From there, you can browse and select the photo you want to upload.



- ▶ The following file types are supported for profile and signature photos:
 - .jpeg
 - .jpg
 - .png
- ▶ If you try to upload a file in any other format, an “**Invalid image type**” error message will appear.



Remember:

- ▶ You must **sync your device** to upload all images to Instafin Web.
- ▶ You can **cancel a sync at any time**. However, if you do so while images are still uploading, any unuploaded pictures will be deleted from the sync bundle.
- ▶ A popup warning will appear to notify you that these images will be automatically removed if you proceed with the cancellation.

Note:

- ▶ Deleting a client’s submitted photo from your **device’s gallery** does not remove it from the client’s profile in IFOA, the photo will remain visible in the system.

Acknowledgement and Approval

This **Capture or Upload Client Photo and Signature** Standard Operating Procedure (SOP) has been reviewed and approved by the authorized signatories. Their signatures confirm acceptance of its content and authorize its official implementation.

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